UServeUtah
Utah Commission on Service & Volunteerism

IPT AmeriCorps Tracking System
Program Director User Guide

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Introduction to Intern Placement Tracking (IPT)

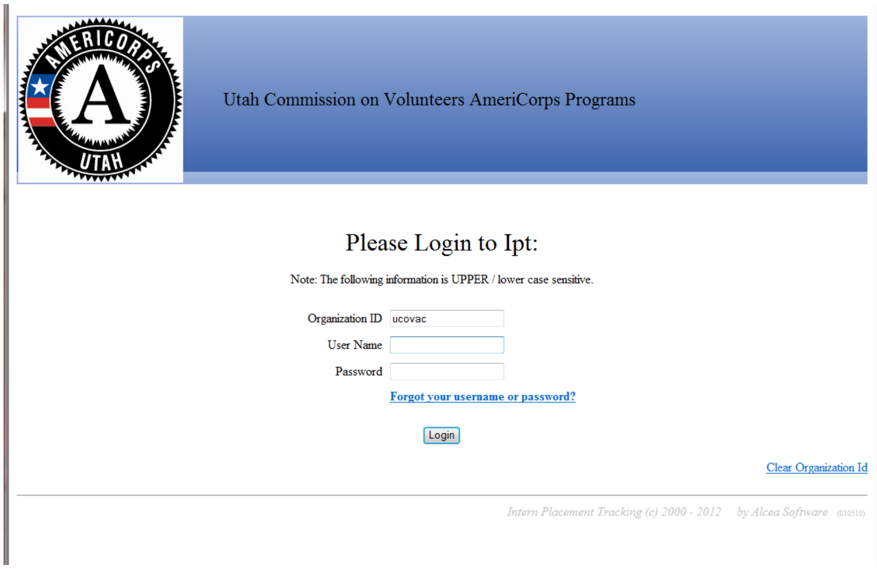
Using this Guide

This user guide is meant to inform program directors on the use of the AmeriCorps Member Tracking System. The features are listed in visual order and not in order of daily operations. To view the IPT System Flow, please go to page 16.

Using the System

Welcome to the Utah Commission on Service and Volunteerism AmeriCorps Member Tracking System. You will use this software as a system of record, to review hours and track your members AmeriCorps term progress.

Logging In



Utah Commission on Volunteers AmeriCorps Programs

Please Login to Ipt:

Note: The following information is UPPER / lower case sensitive.

Organization ID: ucovac

User Name:

Password:

AMERICORPS UTAH
Forgot your username or password?
Login
Clear Organization Id
Intern Placement Tracking (c) 2000 - 2012 by Alcea Software (010510)

Prior to logging in the first time, you will receive an email with some or all of the following information:

To access the AmeriCorps tracking system:
www.runipt.com
ORG ID: ucovac
First Time Username: ABC0101D
First Time password: ipt

Welcome to the Utah Commission on Service and Volunteerism AmeriCorps Member Tracking System. Please use the login information listed above to access the required forms for this program. Please bookmark the site runipt.com and our organization id: ucovac. Once you have used this org id on a computer, it should remain in your browser so you won't have to enter it again. Federal Regulations require a unique username and password for every AmeriCorps member and supervisor. Sharing username and password information is in violation of federal regulations and may be reason for removal from the program.

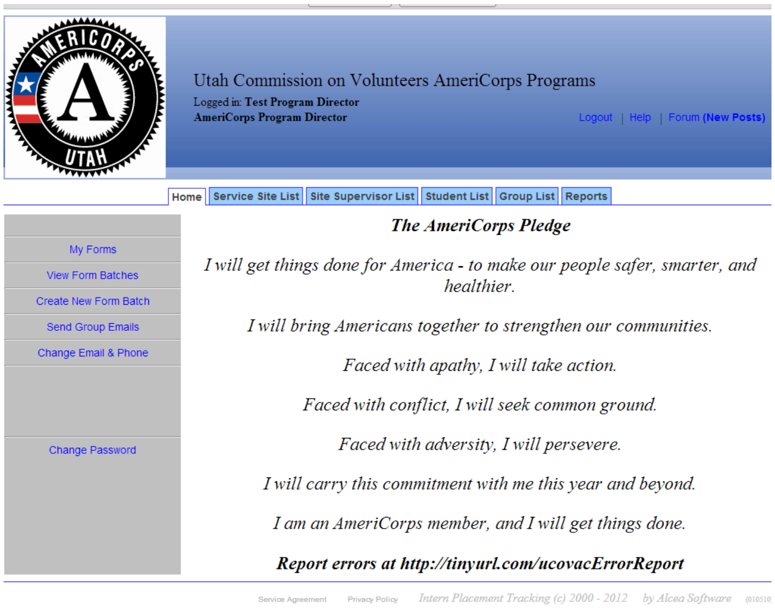
After logging in for the first time, using the default Login Name and Password you will be asked to create a new Login Name and Password. These are case sensitive and should be kept confidential.

All IPT users will be prompted to change their passwords every 60 days. Users will click the “forgot password” link and provide the organization ID, their account type, and the email address associated with their account. A reset email will be sent to that email address. They will then be asked to input their old password to make this update.

Be sure to create a Login Name and Password that you can remember.

Once you have logged in, you will see your home screen. The home screen contains all of the links and tabs you will need within the tracking system throughout your time with AmeriCorps.

Home Screen Features


AMERICORPS
A
UTAH
Logout | Help | Forum (New Posts)
Home
Service Site List
Site Supervisor List
Student List
Group List
Reports
My Forms
View Form Batches
Create New Form Batch
Send Group Emails
Change Email & Phone
Change Password
Service Agreement
Privacy Policy

Utah Commission on Volunteers AmeriCorps Programs

Logged in: **Test Program Director**
AmeriCorps Program Director

The AmeriCorps Pledge

I will get things done for America - to make our people safer, smarter, and healthier.

I will bring Americans together to strengthen our communities.

Faced with apathy, I will take action.

Faced with conflict, I will seek common ground.

Faced with adversity, I will persevere.

I will carry this commitment with me this year and beyond.

I am an AmeriCorps member, and I will get things done.

Report errors at http://tinyurl.com/ucovacErrorReport

Intern Placement Tracking (c) 2000 - 2012 by Alcea Software (010510

On the left side of the screen you will see seven options in the blue navigation bar: My Forms, View Form Batches, Create New Form Batch, Send Group Emails, Change Email & Phone, Edit Member Service Agreement and Change Password.

My Forms: List of all of the forms that have been assigned to you to complete.

View Form Batches: See all of the forms that you have ever assigned to members.

Create New Form Batch: Schedule new forms for groups of members.

Send Group Emails: Email a group of members, site supervisors or sites directly from the system.

Change Email & Phone: Change the contact information that we have in the system for you.

Edit Member Service Agreement: Make edits to the portions of the Member Service Agreement that are program specific.

Change Password: Create a new password. If you believe your password has been compromised you should change it immediately.

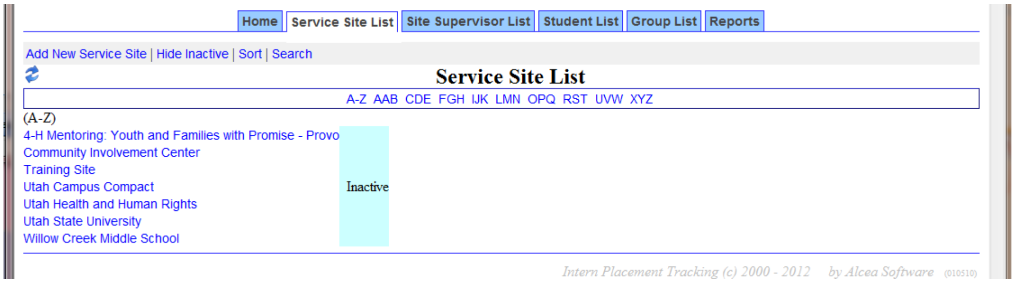
Tabs

- **Home:** This tab will bring you back to the home screen.
- **Service Site List:** A list of all of the service sites within your program and allow you to access site detail.
- **Site Supervisor List:** A list of all of the site supervisors within your program and allow you to access site supervisor detail.
- **Student List:** A list of all of the members within your program and allow you to access the member detail.
- **Group List:** A list of all of the groups within your program. Groups are how we identify which members belong to a certain time frame in their AmeriCorps service. For example, you may call one of your groups "2012-13 Enrollments for Program X."
- **Reports:** Run reports on your program.

A detailed description of each tab is given below.

Service Site List

The service site list will show you all of the sites that your program places members at. There is an option to view sites alphabetically. You can either view all sites from A-Z or view by a few letters at a time. Across the top of this tab you will see the following options: Add new Service Site, Hide Inactive, Sort and Search. There is a refresh button directly below those options. After you add a new site, you may need to use the refresh button to see the site in the list.


Home
Service Site List
Site Supervisor List
Student List
Group List
Reports
Add New Service Site | Hide Inactive | Sort | Search
A-Z AAB CDE FGH IJK LMN OPQ RST UVW XYZ

Service Site List

(A-Z)

4-H Mentoring: Youth and Families with Promise - Provo	
Community Involvement Center	
Training Site	
Utah Campus Compact	Inactive
Utah Health and Human Rights	
Utah State University	
Willow Creek Middle School	

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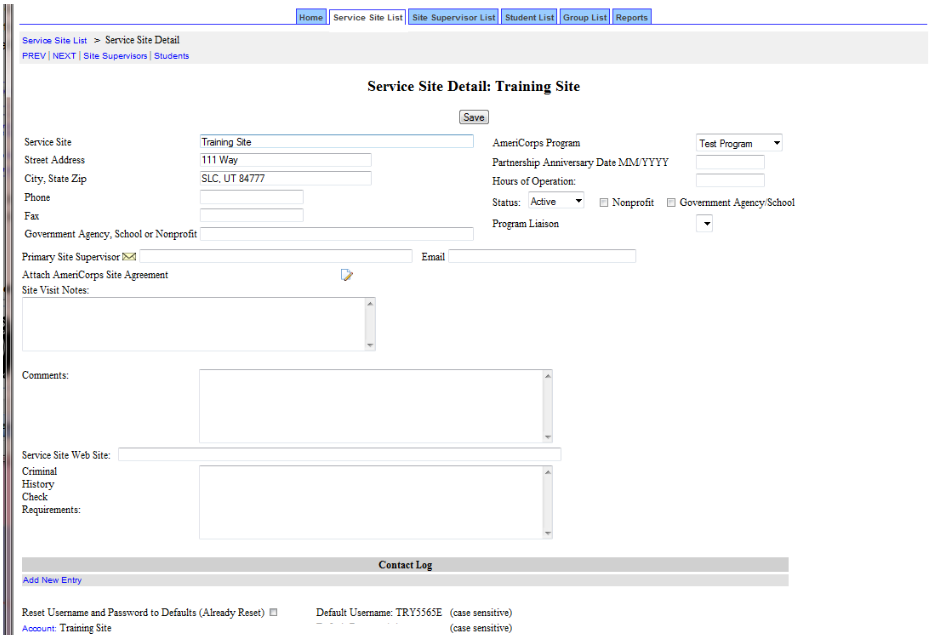
By clicking on one of the service sites, you will be allowed to view details about the service site.


Home
Service Site List
Site Supervisor List
Student List
Group List
Reports
Service Site List > Service Site Detail
PREV | NEXT | Site Supervisors | Students
Save

Service Site Detail: Training Site

Service Site: Training Site
Street Address: 111 Way
City, State Zip: SLC, UT 84777
Phone
Fax
Government Agency, School or Nonprofit
AmeriCorps Program: Test Program
Partnership Anniversary Date MM/YYYY
Hours of Operation:
Status: Active ☐ Nonprofit ☐ Government Agency/School
Program Liaison
Primary Site Supervisor
Email
Attach AmeriCorps Site Agreement
Site Visit Notes:
Comments:
Service Site Web Site:
Criminal History Check Requirements:

Contact Log

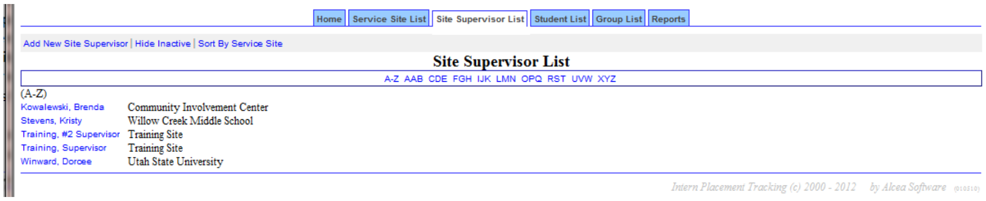
Add New Entry

Reset Username and Password to Defaults (Already Reset) ☐
Default Username: TRY5565E (case sensitive)
(case sensitive)
Account: Training Site

In order to add a new site to [illegible] you will need to have a site name and address, and you will need to know if it is a nonprofit, government agency or public school. All other fields are entered into the system at your discretion. Remember to hit save every time you add information to the system.

Site Supervisor List

The site supervisor list will show you all of the site supervisors that your program assigns members to. There is an option to view site supervisors alphabetically by last name. You can either view all supervisors from A-Z or view by a few letters at a time. Across the top of this tab you will see the following options: Add new Site Supervisor, Hide Inactive, and Sort by Service Site.


Home
Service Site List
Site Supervisor List
Student List
Group List
Reports
Add New Site Supervisor | Hide Inactive | Sort By Service Site
A-Z AAB CDE FGH IJK LMN OPQ RST UVW XYZ

Site Supervisor List

(A-Z)

Kowalewski, Brenda	Community Involvement Center
Stevens, Kristy	Willow Creek Middle School
Training, #2 Supervisor	Training Site
Training, Supervisor	Training Site
Winward, Doroee	Utah State University

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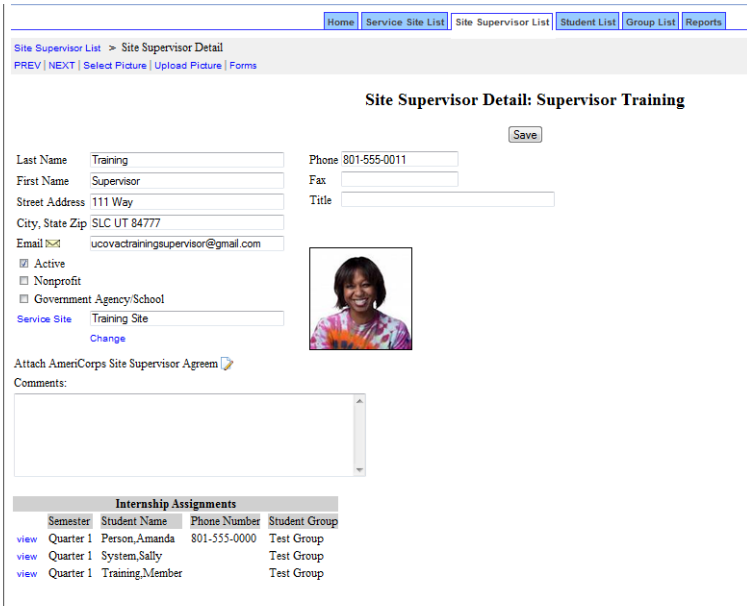
In order to add a new site supervisor to the system, you will need to enter a first and last name, site and email address. All other fields are entered into the system at your discretion. Remember to hit save every time you add information to the system. The site supervisor detail also allows you to view which members have been assigned to the site supervisor.

By clicking on one of the site supervisor’s names, you will be allowed to view details about the site supervisor. You will need to assign a site supervisor to the Service Site where they will be monitoring member service. To assign a site supervisor to their service site, click on the “Change” link at the center of the profile. This will pull up a list of all of the service sites within your program. Select the appropriate site and then click save on their profile. As a note, the site should exist in the system before the site supervisor.


Home
Service Site List
Site Supervisor List
Student List
Group List
Reports
Site Supervisor List > Site Supervisor Detail
PREV | NEXT | Select Picture | Upload Picture | Forms
Save
Change

Site Supervisor Detail: Supervisor Training

Last Name	Training	Phone	801-555-0011
First Name	Supervisor	Fax	
Street Address	111 Way	Title	
City, State Zip	SLC UT 84777		
Email	ucovactrainingsupervisor@gmail.com		

☑ Active
☐ Nonprofit
☐ Government Agency/School

Service Site: Training Site

Attach AmeriCorps Site Supervisor Agreem

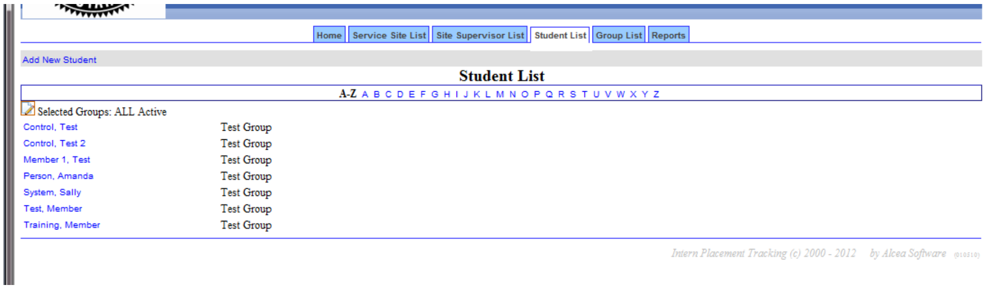
Comments:

Internship Assignments

	Semester	Student Name	Phone Number	Student Group
view	Quarter 1	Person,Amanda	801-555-0000	Test Group
view	Quarter 1	System,Sally		Test Group
view	Quarter 1	Training,Member		Test Group

Student List

Because this program was designed as intern placement software, many of the terms used relate specifically to schools. Please note that anytime the system uses the word Student, it is referring to the member. The student list will show you all of the AmeriCorps members currently enrolled in your program. Across the top of this tab you will see the option to add a new student (member). There is an option to view members alphabetically by last name. You can either view all members from A-Z or view by an individual letter.


Home
Service Site List
Site Supervisor List
Student List
Group List
Reports
Add New Student
A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Student List

Selected Groups: ALL Active

Control, Test	Test Group
Control, Test 2	Test Group
Member 1, Test	Test Group
Person, Amanda	Test Group
System, Sally	Test Group
Test, Member	Test Group
Training, Member	Test Group

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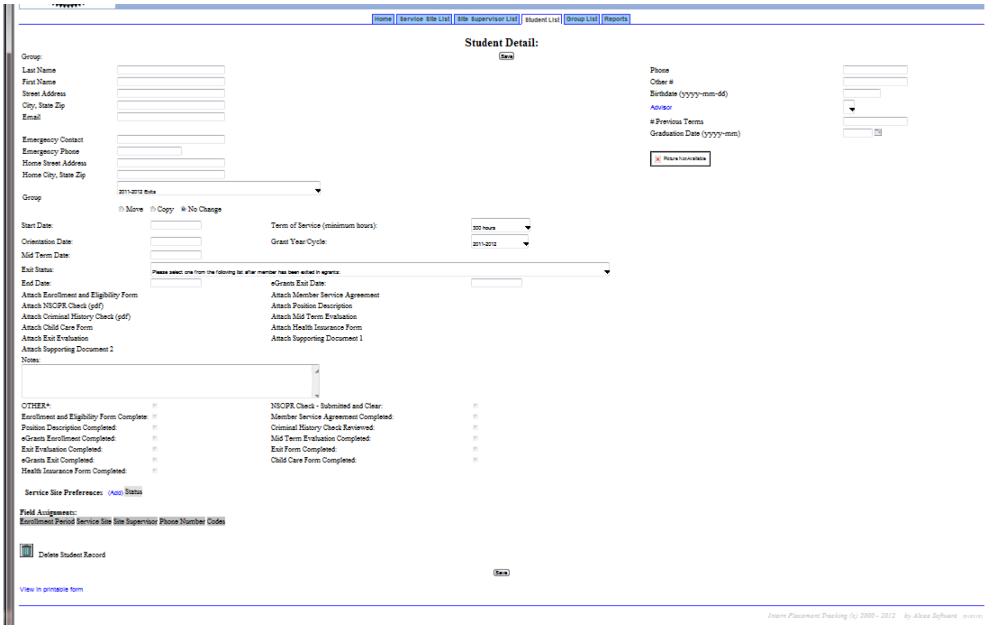
By clicking on one of the member’s names, you will be allowed to view details about the member in the Student detail page.

Student Detail



Student Detail:

Group:
Last Name
First Name
Street Address
City, State Zip
Email

Emergency Contact
Emergency Phone
Home Street Address
Home City, State Zip
Group: 2011-2012 Extra
○ Move ○ Copy ● No Change

Phone
Other #
Birthdate (yyyy-mm-dd)
Advisor
Previous Terms
Graduation Date (yyyy-mm)

Start Date:
Term of Service (minimum hours): 300 hours
Orientation Date:
Grant Year/Cycle: 2011-2012
Mid Term Date:
Exit Status: Please select one from the following list after member has been exited in egrants:
End Date:
eGrants Exit Date:
Attach Enrollment and Eligibility Form
Attach Member Service Agreement
Attach NSOPR Check (pdf)
Attach Position Description
Attach Criminal History Check (pdf)
Attach Mid Term Evaluation
Attach Child Care Form
Attach Health Insurance Form
Attach Exit Evaluation
Attach Supporting Document 1
Attach Supporting Document 2
Notes:

OTHER*: ☐
NSOPR Check - Submitted and Clear: ☐
Enrollment and Eligibility Form Complete: ☐
Member Service Agreement Completed: ☐
Position Description Completed: ☐
Criminal History Check Reviewed: ☐
eGrants Enrollment Completed: ☐
Mid Term Evaluation Completed: ☐
Exit Evaluation Completed: ☐
Exit Form Completed: ☐
eGrants Exit Completed: ☐
Child Care Form Completed: ☐
Health Insurance Form Completed: ☐

Service Site Preferences (Add) Status

Field Assignments:

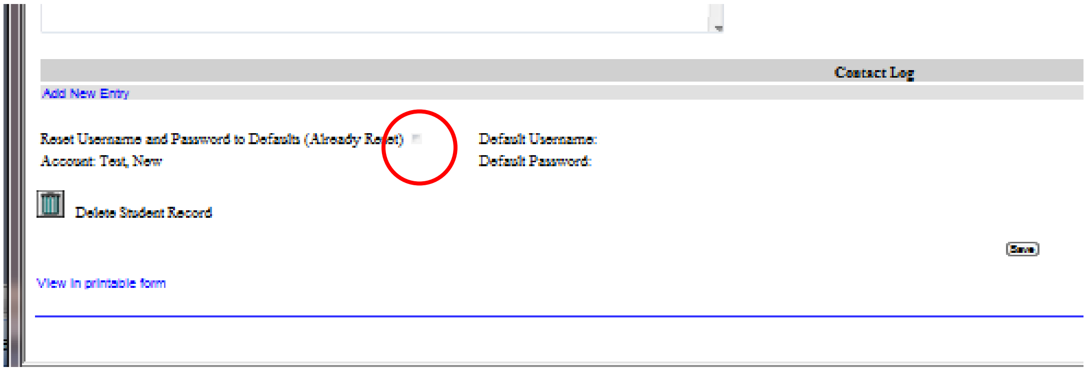
Enrollment Period	Service Site	Site Supervisor	Phone Number	Codes

To create a new member profile in the system, select add new student from the student list page. You are required to enter First name, last name, email address and group to start a member in the system. The other fields must be filled before a member may access their member service agreement. The fields below the Emergency contact information may only be entered by program administrative staff. The Utah Commission on Service and Volunteerism requires the following attachments and checkboxes to be completed:

Attachments	**Checkboxes**
NSOPR Check	Enrollment and Eligibility Form
Criminal History Check	NSOPR Check
Mid Term Evaluation	Criminal History Check
Exit Evaluation	Member Service Agreement
	Position Description
	EGrants Enrollment
	Child Care Form (only if member is eligible)
	Health Insurance Form (only if member is eligible)
	Mid Term Evaluation
	Exit Form
	Exit Evaluation

Once you have entered all of the initial information, you will click save either at the top or the bottom center of the page. This will create the member profile in the system.

When you are ready to give a member access to the system, scroll to the bottom of the member detail page. There is a small checkbox next to the Default Username and Password. By clicking on this box, it will generate the username and password for the member and send an automated email to the member inviting them to utilize the system.



Reset Username and Password to Defaults (Already Reset) ☐
Account: Test, New

Default Username:
Default Password:

Other options within the member detail:

Across the top of the member detail there are several links to pages associated with this members file. Each has a specific purpose and function within the system.

PREV: This will take you to the previous member in the alphabetized list of members.

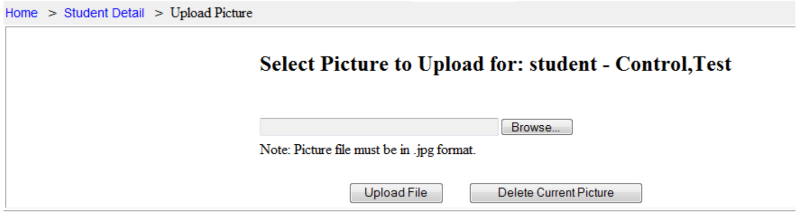
NEXT: This will take you to the next member in the alphabetized list of members.

Custom Fields: This will take you to a separate page where more documents can be uploaded to a member file. The program director for each program may determine how these fields are utilized unless otherwise directed by the state program manager.

Forms: This allows you to view all of the forms for a specific member. More information on this page is described in the section of this user guide titled Forms.

Select Picture: This feature should not be used.

Upload Picture: The option to upload a picture of the members is available. The program will determine if this is a requirement. The picture should be a portrait type image of the member. To upload a picture, click on the link. You will see a dialogue box which reads:



Select Picture to Upload for: student - Control,Test

Note: Picture file must be in .jpg format.

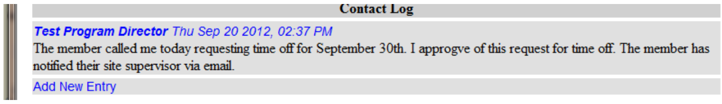
Select picture to upload for: YOUR NAME
Using the browse button, you will be able to locate an image on your computer to upload to your detail. Once you have selected the image, select upload file. To change the image, click on the link again and select Delete Current Picture.

Dashboard: This is a quick place to view an individual member's progress towards completion of their hours within the system. More information on this page is described in the section of this user guide titled Dashboard.

Progress: This is a quick place to view an individual member's progress towards collecting demographic data and great stories. More information on this page is described in the section of this user guide titled Progress.

Field Assignments: A field assignment is the location and supervisor assigned to a member. This can be found toward the bottom of the member detail page. For Placement 1 select change and then select the site supervisor that the member is assigned to. This will link the accounts so that when a form is assigned to a member, the site supervisor becomes the person required to approve the form. A placement is the initial site and supervisor for a member. You will only enter information for Placement 2, 3, or 4 if a member needs to be reassigned. *Do not delete or change site supervisors for members that need to be reassigned. Just add a new placement. Their record will then show that there was a change.* *Please note that if you assign a member to a second placement, you will need to batch their forms through a second, third or fourth placement when the form asks you for the group "semester."

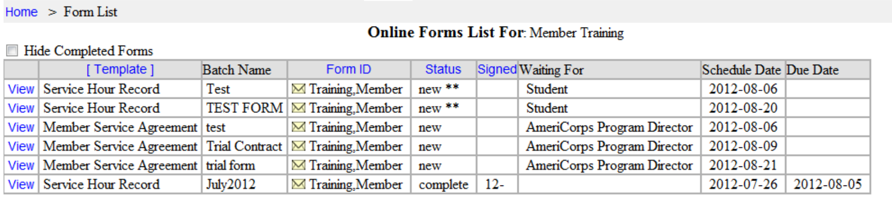
Contact Log: At the bottom of the member detail, you can track any contacts that you make with the member. Select "Add New Entry" to enter new detail. A narrative field opens up where you can add new any information that needs to be documented about your interactions with a member, site supervisor or site. Only the commission, the program director and the member can view these entries. These entries are time and date stamped, so it is the best way to track contact with members.



Test Program Director Thu Sep 20 2012, 02:37 PM
The member called me today requesting time off for September 30th. I approgve of this request for time off. The member has notified their site supervisor via email.

Forms

This link will take you to the same place that the My Forms button and Uncompleted Forms link on the home screen will take you. There will be a list of all of the forms that have been assigned to this member. Each Row is a separate form.



Online Forms List For: Member Training

☐ Hide Completed Forms

	[Template]	Batch Name	Form ID	Status	Signed	Waiting For	Schedule Date	Due Date
View	Service Hour Record	Test	✉ Training,Member	new **		Student	2012-08-06	
View	Service Hour Record	TEST FORM	✉ Training,Member	new **		Student	2012-08-20	
View	Member Service Agreement	test	✉ Training,Member	new		AmeriCorps Program Director	2012-08-06	
View	Member Service Agreement	Trial Contract	✉ Training,Member	new		AmeriCorps Program Director	2012-08-09	
View	Member Service Agreement	trial form	✉ Training,Member	new		AmeriCorps Program Director	2012-08-21	
View	Service Hour Record	July2012	✉ Training,Member	complete	12-		2012-07-26	2012-08-05

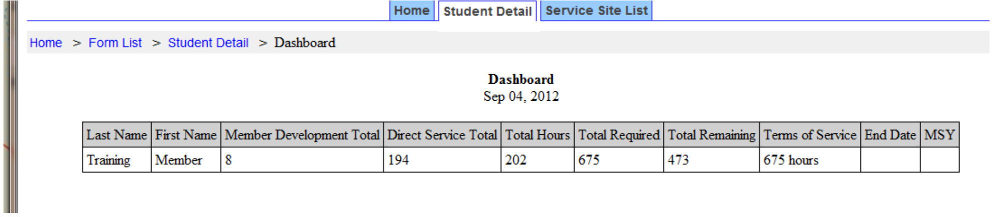
Each column designates information related to the form. **Template** identifies which form type was assigned. **Batch Name** indicates information that the program director wants you to know about the form. **Form ID** indicates who the form belongs to. **Status** describes whether the form is new, active or complete. **Signed** designates who has signed the form. A "1" means that the first person required to sign the form has signed it, this is usually the member. A "2" means that the second person required to sign the form has signed it; this is usually the site supervisor. Some programs may require more than two signatures, if this is the case for your program there will be space for additional signatures.

The **Waiting For** column indicates who needs to complete the form next. The **Schedule Date** is the date that the form was sent out and the **Due Date** indicates the date the form is due. Selecting **View** next to any of the forms, you can view and/or complete the forms that are required by your program. If you are required to enter data or a signature, there will be open fields for you to complete.

Once a form is completed, if you no longer wish to see it in your list, you can select the box "Hide Completed Forms" at the top of your forms list. This will not erase your forms, it will simply make it easier to see only the forms that still require signatures. You may also sort your forms list by any of the columns whose headings are in blue.

Dashboard

The dashboard is a feature of IPT which allows a member to track their progress in the system for completing their AmeriCorps term.



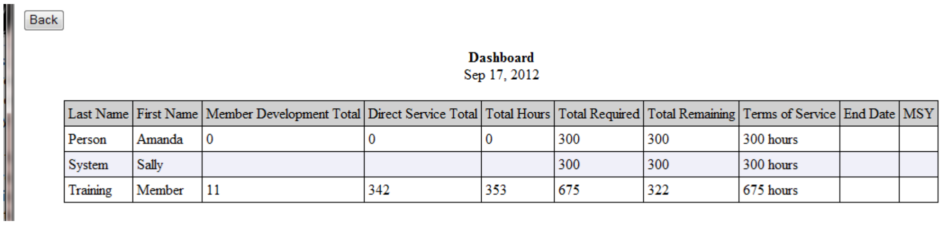
Dashboard
Sep 04, 2012

Last Name	First Name	Member Development Total	Direct Service Total	Total Hours	Total Required	Total Remaining	Terms of Service	End Date	MSY
Training	Member	8	194	202	675	473	675 hours		

Hours recorded in the dashboard reflect all hours entered into the system and may include hours that have not yet been approved. Please verify that service hour records have all been signed and approved in order to get the most accurate reflection of their service on this dashboard.

Completion of an AmeriCorps term requires that time and attendance record keeping be conducted by the individual who supervises the AmeriCorps member. This time and attendance record is used to document member eligibility for in-service and post-service benefits. Time and attendance records must be signed and dated both by the member and by an approved individual with oversight responsibilities for the member.

A program director has access to view all dashboards under their purvey all at once. By selecting Reports and then Dashboard, a program director can select which program they wish to view and then select run report. A dashboard containing all of the member data entered to date is viewable in this format.



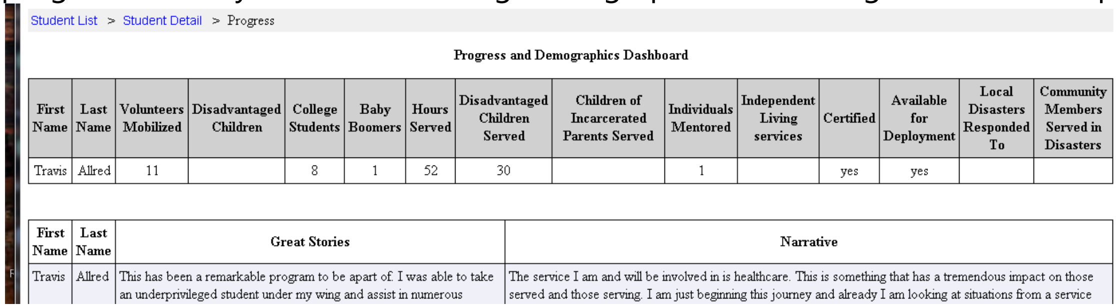
Dashboard
Sep 17, 2012

Last Name	First Name	Member Development Total	Direct Service Total	Total Hours	Total Required	Total Remaining	Terms of Service	End Date	MSY
Person	Amanda	0	0	0	300	300	300 hours		
System	Sally				300	300	300 hours		
Training	Member	11	342	353	675	322	675 hours		

Remember that hours recorded in the dashboard reflect all hours entered into the system and may include hours that have not yet been approved. Please verify that service hour records have all been signed and approved in order to get the most accurate reflection of a member's service on this dashboard.

Progress

The Progress link is a feature of IPT which allows a member to visualize and track their progress in the system for collecting demographic data during their AmeriCorps term.



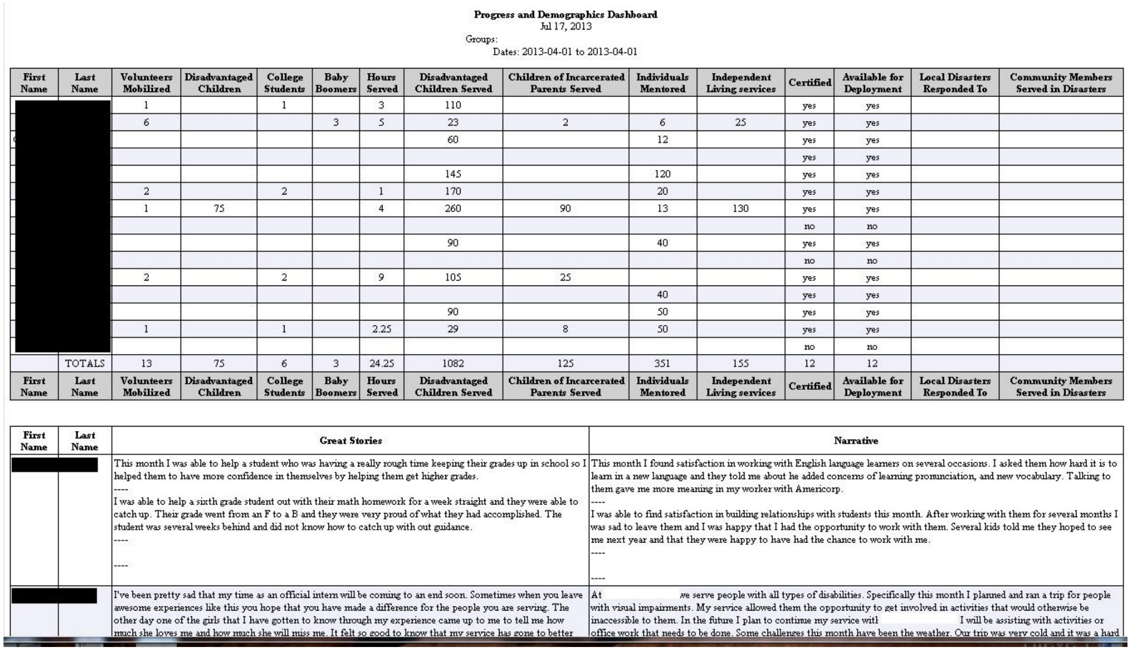
Progress and Demographics Dashboard

First Name	Last Name	Volunteers Mobilized	Disadvantaged Children	College Students	Baby Boomers	Hours Served	Disadvantaged Children Served	Children of Incarcerated Parents Served	Individuals Mentored	Independent Living services	Certified	Available for Deployment	Local Disasters Responded To	Community Members Served in Disasters
Travis	Allred	11		8	1	52	30		1		yes	yes		

First Name	Last Name	Great Stories	Narrative
Travis	Allred	This has been a remarkable program to be apart of. I was able to take an underprivileged student under my wing and assist in numerous	The service I am and will be involved in is healthcare. This is something that has a tremendous impact on those served and those serving. I am just beginning this journey and already I am looking at situations from a service

Completion of an AmeriCorps Progress Report by AmeriCorps program directors is a requirement of the program, and the majority of the data required can be collected utilizing the Progress and Demographic Reporting Form that may be completed by members. This form may be batched out to members on a monthly or weekly interval.

A program director has access to view all Progress under their purvey all at once. By selecting Reports and then Progress, a program director can select which program they wish to view and the dates that they wish to include, and then select run report. A report containing the entire member data entered during that date range is viewable in this format, including aggregated demographic data for all of your selected groups.



Progress and Demographics Dashboard
Jul 17, 2013
Groups:
Dates: 2013-04-01 to 2013-04-01

First Name	Last Name	Volunteers Mobilized	Disadvantaged Children	College Students	Baby Boomers	Hours Served	Disadvantaged Children Served	Children of Incarcerated Parents Served	Individuals Mentored	Independent Living services	Certified	Available for Deployment	Local Disasters Responded To	Community Members Served in Disasters
[redacted]	[redacted]	1		1		3	110				yes	yes		
[redacted]	[redacted]	6			3	5	23	2	6	25	yes	yes		
[redacted]	[redacted]						60		12		yes	yes		
[redacted]	[redacted]										yes	yes		
[redacted]	[redacted]						145		120		yes	yes		
[redacted]	[redacted]	2		2		1	170		20		yes	yes		
[redacted]	[redacted]	1	75			4	260	90	13	130	yes	yes		
[redacted]	[redacted]										no	no		
[redacted]	[redacted]						90		40		yes	yes		
[redacted]	[redacted]										no	no		
[redacted]	[redacted]	2		2		9	105	25			yes	yes		
[redacted]	[redacted]								40		yes	yes		
[redacted]	[redacted]						90		50		yes	yes		
[redacted]	[redacted]	1		1		2.25	29	8	50		yes	yes		
[redacted]	[redacted]										no	no		
	TOTALS	13	75	6	3	24.25	1082	125	351	155	12	12		
First Name	**Last Name**	**Volunteers Mobilized**	**Disadvantaged Children**	**College Students**	**Baby Boomers**	**Hours Served**	**Disadvantaged Children Served**	**Children of Incarcerated Parents Served**	**Individuals Mentored**	**Independent Living services**	**Certified**	**Available for Deployment**	**Local Disasters Responded To**	**Community Members Served in Disasters**

First Name	Last Name	Great Stories	Narrative
[redacted]	[redacted]	This month I was able to help a student who was having a really rough time keeping their grades up in school so I helped them to have more confidence in themselves by helping them get higher grades. ---- I was able to help a sixth grade student out with their math homework for a week straight and they were able to catch up. Their grade went from an F to a B and they were very proud of what they had accomplished. The student was several weeks behind and did not know how to catch up with out guidance. ---- ----	This month I found satisfaction in working with English language learners on several occasions. I asked them how hard it is to learn in a new language and they told me about he added concerns of learning pronunciation, and new vocabulary. Talking to them gave me more meaning in my worker with Americorp. ---- I was able to find satisfaction in building relationships with students this month. After working with them for several months I was sad to leave them and I was happy that I had the opportunity to work with them. Several kids told me they hoped to see me next year and that they were happy to have had the chance to work with me. ---- ----
[redacted]	[redacted]	I've been pretty sad that my time as an official intern will be coming to an end soon. Sometimes when you leave awesome experiences like this you hope that you have made a difference for the people you are serving. The other day one of the girls that I have gotten to know through my experience came up to me to tell me how much she loves me and how much she will miss me. It felt so good to know that my service has gone to better	At we serve people with all types of disabilities. Specifically this month I planned and ran a trip for people with visual impairments. My service allowed them the opportunity to get involved in activities that would otherwise be inaccessible to them. In the future I plan to continue my service witl I will be assisting with activities or office work that needs to be done. Some challenges this month have been the weather. Our trip was very cold and it was a hard

Forms

Utah AmeriCorps Enrollment/ Eligibility Verification Form
This form is the very first form a member is required to complete in the IPT system as part of their AmeriCorps term. Every field is required. A member should complete this form as soon as they are given access to the AmeriCorps tracking system.

If the member is under 18 a parent or legal guardian is required to sign the form. After completing the form in the system, please use the printable version link at the bottom of the form and have a parent or guardian sign a paper version of the form. The program director then scans and saves to the online member detail next to the form upload option "Attach Enrollment and Eligibility Form".

Member Service Agreement
The member service agreement is the contract between a member and the AmeriCorps program. The program director will enter all of the fields required on the student detail page. Applicable fields will auto-populate onto the individual member's MSA. It is the member's responsibility to read and review the entire form and sign via an electronic signature, before beginning their term of service. ***Members cannot begin counting hours until this agreement is signed and IPT will prevent hours from being logged.*** All terms must be in writing within the Member Service Agreement to be valid.

Member Service Agreement Addendum
This form is an acknowledgement between the member and program director that certain things were discussed and that the member agrees to things.

Accompaniment Form 1
This form must be completed when a background check is initiated but not yet completed for a member with recurring access to vulnerable populations. This should be completed before their first date of service and the member must be accompanied until the Program Director receives the background checks back and clears them for unaccompanied service.

An individual is accompanied when he or she is in the physical presence of a person cleared for access to a vulnerable population.

Recurring access is defined as ''the ability on more than one occasion to approach, observe, or communicate with, an individual, through physical proximity or other means. Vulnerable populations include children age 17 or younger, persons age 60 and older, and/or individuals with disabilities. ''Individuals with disabilities'' includes any person who has a physical or mental impairment which substantially limits one or more major life activities, has a record of such an impairment, or is regarded as having such an impairment.

Accompaniment Form 2

This form must be completed by the site supervisor, once a member has been cleared for unaccompanied recurring service with a vulnerable population. The site supervisor uses the form to certify the dates that the member was accompanied.

Service Hour Record

This is the timekeeping form used by all Utah AmeriCorps programs. The program director should determine the amount of detail required in the service hour record descriptions. Only 15 minute increments should be counted, so members should save their hours in the following format.

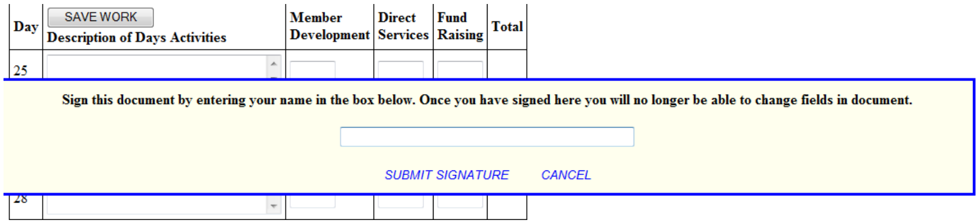
15 min = .25
30 min = .50
45 min. = .75
1 hour = 1

Members should round up or down to the nearest 15 minute mark. They should enter their time in the correct category as described on the form, either Member Development, Direct Service or Fund Raising.

Members are required to enter time for every day. They should enter a “0” in the direct service column for any day that they did not serve. They may enter their time at any point AFTER the service has been completed, before the due date. They should not enter time before they actually do that service. Early entry of time is considered to be fraud and can be grounds to terminate an AmeriCorps term. Remind members to save their work every day that they enter time.

In the daily description box, members are required to select an item from the drop-down box that matches what they did that day in relation to their AmeriCorps service. Each member is required to utilize a description from a required list made by their particular program. These descriptions are based on the members position description. If they did not serve that day, because it was a weekend or they weren’t scheduled, they should write “Did not serve today.” or “N/A”. It is required that they enter a description for every day, even if they did not serve.

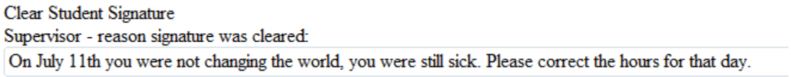
At the end of their service for that time period, members will submit their Service Hour Record. By selecting the submit button, they will be directed to the following dialogue box:



Sign this document by entering your name in the box below. Once you have signed here you will no longer be able to change fields in document.

By entering their name, they declare and affirm under penalty of perjury that the statements made herein are true and correct to the best of their knowledge, information and belief and that the time entered was completed by the member indicated on the dates indicated. They further declare that this time was spent performing allowable AmeriCorps activities.

Once they have submitted their Service Hour Record, an email will automatically go to their site supervisor requesting approval on the service hour record. If the site supervisor does not approve of the time, the member will receive an email that will indicate that their service hour record signature has been cleared. They will need to return to that form in IPT to review the reason that their site supervisor did not approve the service hour record. Make the corrections to the form and then re-sign the form.



Clear Student Signature

Supervisor - reason signature was cleared:

On July 11th you were not changing the world, you were still sick. Please correct the hours for that day.

Site supervisors should be the only ones to clear signatures on service hour records. Because the site supervisor is acting as the person with oversight responsibility for the member service hours, they need to be the one to clear the signature. They will have to re-sign the form, so it is best that they are the one to clear signatures that are incorrect so they can note the errors. The integrity of the form data needs to remain in tact, so only those directly involved in service hours should be making changes to the service hour record.

Monthly Progress and Demographic Reporting Form

This form is used to record all of the narrative and demographic data that is required from the Corporation for National and Community Service, the federal agency with oversight responsibility for AmeriCorps. This information is very valuable for maintaining funding for your program. Members should take this form very seriously and enter data that is accurate and paints a picture of the significant work they are doing to change their community.

The narrative portions of this form are program specific. Program directors should inform their members as to what data is required for your program. A member may be terminated from the program if they fail to report the required information to program directors in this form.

Exit Form

This form has a section for the member to complete and a section for the program director to complete. This form must be utilized when exiting a member from service, in addition to the required exit process in My AmeriCorps/eGrants. This form is important to gather member contact information and interest in post service opportunities. The member can also give consent for CNCS to release their information to organizations such as AmeriCorps Alums. They also certify their service hours. The program director also certifies the member's time.

Scheduling/Assigning Forms

Be advised that you may not want to schedule forms for members that are too far in the future. You do not want to be questioned about the integrity of your program data based on service hour records or other forms that were created and completed before the service was actually performed.

IPT System Flow

There is a very specific flow to follow in order to enter member data and schedule forms in the most user-friendly and efficient manner. This will be known as the IPT System Flow. Please review this process and utilize the work flow to efficiently send out forms to members.

Step 1: Create Service Sites

How: Login → Service Site List → Add new Service Site → enter Service Site Name and all other detail to record → Assign to AmeriCorps Program → Save
Repeat for as many sites as you have ready to start. Don't go on to the next step if you have other sites to enter until you have repeated step 1 for all sites.

Note: if you need to create a new site that will host members from multiple AmeriCorps programs, please make a request for UServeUtah staff to create the site so that it can be accessible by each program.

Step 2: Create Site Supervisor

How: Login → Site Supervisor List → Add new Site Supervisor → enter Last Name, First Name, Email address and all other detail to record → Change Service Site → Select Site from the List that pops up → Save
Repeat for as many site supervisors as you have ready to start. Don't go on to the next step if you have other site supervisors to enter until you have repeated step 1 and 2 for all site supervisors.

Note: if a site supervisor will host members from multiple AmeriCorps programs and has multiple login accounts, please make a request for UServeUtah staff to merge the two accounts so the supervisor has one login.

Step 3: Create Group

How: Login → Group List → Add new Group → Name (must start with program year and abbreviation (e.g. 16-17 UCC Field Crews or 15-16 STEM PT) → Assign to Program → Short name (only 8 characters) → check box "Include students in site supervisor list" →check box "Allow Students to Login" → Save

Step 4: Enter new member in system

How: Login → Student List → Add New Student → enter Last Name, First Name and Email Address → Assign to group → Assign to Field Placement (Service Site/ Site Supervisor) → Save → Select Reset Username and password box → Save → AUTOMATED EMAIL IS SENT TO MEMBER
Repeat for as many members as you have ready to start. Don't go on to the next step if you have other members until you have repeated steps 1 and 2 for all members.

Step 5: Schedule Enrollment Form
How: Login → Create New Form Batch → Enrollment Eligibility Verification → Next → Batch Name: (Give the Form a very specific name "October 1 2012 Enrollments" → Group → Program Director → Semester → Next → Optional Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

> **If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.**
> **How:** Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → Automated email is **NOT** sent to member

Step 6: Edit Member Service Agreement
How: Login → Edit Member Service Agreement → Select Program → Edit Fields (You may use most default text, but make edits where needed) → Save

Step 7: Schedule Member Service Agreement
How: Login → Edit Member Service Agreement → Create New Form Batch → Member Service Agreement → Next → Batch Name: (Give the Form a very specific name "October 1 2012 MSA" → Group → Program Director → Semester → Next → Optional Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

> **If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.**
> **How:** Login → Edit Member Service Agreement (if necessary) → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → Automated email is **NOT** sent to member
>
> **If you plan on batching MSA's for multiple groups at a time, you will need to following these steps:**
> **How:** Login → Edit Member Service Agreement (group 1) → Create New Form Batch → Member Service Agreement → Next → Batch Name: (Give the Form a very specific name "16-17 [Program Name] [group name]" → Group → Program Director → Semester → Next → Optional Due Date → Finish Scheduling → Program Director signs all the forms (this will lock the text on the MSA)

Edit Member Service Agreement (group 2) → Create New Form Batch → Member Service Agreement → Next → Batch Name: (Give the Form a very specific name "16-17 [Program Name] [group name]" → Group → Program Director → Semester → Next → Optional Due Date → Finish Scheduling → Program Director signs all the forms (this will lock the text on the MSA)

Note: If you have access to multiple partitions, when you select the group, the MSA will fill with editable text associated with that partition.

Step 8: Schedule Service Hour Record

How: Login → Create New Form Batch → Service Hour Record (Choose Monthly or Weekly) → Next → Batch Name: (Give the Form a very specific name "October 2012 SHR or October 1-6, 2012 SHR" → Group → Semester → Next → Assign a Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.

How: Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → Automated email is **NOT** sent to member

Note: If the dates on an individual member's time sheet are incorrect, at the bottom of the time sheet is a button that says "Change Start Date"

Repeat scheduling Service Hour Records for each month or week that a member will serve. You may choose to schedule these all at once or once a week/month. We recommend that you do not schedule them more than a month in advance.

Note: If you'd like the ability to block specific members from viewing their time sheets, assign the person who will be doing the blocking as "office reviewer" when batching the form.

Step 9: Schedule Monthly Progress and Demographic Reporting

How: Login → Create New Form Batch → Monthly Progress and Demographic Reporting → Next → Batch Name: (Give the Form a very specific name "October 2012 MPDR" → Group → Semester → Next → Assign a Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.

> **How:** Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → Automated email is **NOT** sent to member

Repeat scheduling Monthly Progress and Demographic Reporting for each month that a member will serve. You may choose to schedule these all at once or once a month. We recommend that you do not schedule them more than a month in advance.

Exiting Members after member completes their service term.

If your members do not all finish their terms around the same time period, please use step 10, otherwise you can skip to step 12

Step 10: Create Group (Program Name Exit Processing)

How: Login → Group List → Add new Group → Name (must include your program abbrv.) → Assign to Program → Short name (only 8 characters) → check box "Include students in site supervisor list" →check box "Allow Students to Login" → Save

Step 11: Move Members to Exit Processing Group

How: Login → Student List → View a Specific Member Name → Move to group → Save

Step 12: Schedule Exit Form

How: Login → Create New Form Batch → Exit Form → Next → Batch Name: (Give the Form a very specific name "October 2013 Exits" → Group → Program Director → Semester → Next → Assign a Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBERS

> **If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.**
> **How:** Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → Automated email is **NOT** sent to member

Step 13: Create Exit Group for the program year (if none exists)

How: Login → Group List → Add new Group → Name (Give the group a specific name, such as 2012-13 March Exits) → Assign to Program → Short name (only 8 characters) → Ensure checkbox next to "Allow students to login" is not selected → Save

Step 14: Reassign member so they will no longer have access to the system

How: Login → Student List → Find Member Name → Change group dropdown to the appropriate exit group → Select Move button → Save

Step 15: Archive Exit and Inactive groups quarterly
How: Login → Group List → Find Group Name → Edit → Unselect "Active" box → Save

Note: You will not be able to add members to a group after it has been archived. For this reason, we ask that you create and archive exit and inactive groups quarterly. Archiving groups are still viewable (show archived button at top left) but will not display by default and will not affect total user count.

Running Reports

IPT has many features that allow you to run reports on your members' progress. This guide will assist you in learning about how to run a variety of reports.

Types of reports you may want to run:

Dashboard of Hours	Form Status
Progress and Demographic Reporting	Member Record Data

Dashboard of Hours

- **To review for a single member**

Login → Student List → Select member → Select Forms → Dashboard → Review Member Totals **Note**Verify that all forms that have been started are completed (forms that are active, but have not been approved will still be included in the dashboard total)

- **To review for all active members in your group**

Login → Reports → Dashboard → Select Group → Generate Report. Review Member Totals **Note**Verify that all forms that have been started are completed (forms that are active, but have not been approved will still be included in the dashboard total)

Progress and Demographic Reporting

- **To review for a single member**

Login → Student List → Select member → Progress → Review Member Totals

- **To review for all active members in your group**

Login → Reports → Progress → Select your group and the date range for the reporting period → Review Member Totals **Note**If you are needing data from January 1-March 31, but you scheduled the form batch in December, you will need to use the date that the form was scheduled, not January 1. This is why it is important to not schedule this form in advance.

Form Status

Login → View Form Batches → Find the form you need a report on → select the tools on the right hand side of the row → Select List → Sort by Status → Review the list of names and who has yet to complete the form

Member Record Data

Login → Reports → Student Custom Export → Select from Available fields on the right. Fields will be moved to the box on the left → Run → Select Group to include in report → Export Data → Open or Save Report

Help from UServeUtah

Questions about the system
Program Directors are responsible for training site supervisors and members and answering questions about IPT. Members and site supervisors should not contact the Commission for any questions related to their term or the use of this system. All members and site supervisors will be directed back to their program director. If you are unable to assist, you may contact UServeUtah to try to find the answer. Program Directors with questions about how to use IPT or other issues should contact UServeUtah's National Service Program Manager.

Reporting Errors/Technical Glitches
As you utilize the system, if there are technical errors, you may report these errors by visiting *http://tinyurl.com/ucovacErrorReport* . Completing this form will allow the UServeUtah to track errors and address them in a timely manner.

Admin Override/Deleting Forms/Member files
You may find instances where you need to delete a form, batch, or member file (if they decided not to serve before being enrolled in e-Grants). You may also find that you need an IPT administrator to complete an action such as reassigning a signer on a form, resetting an office staff's password, creating a multi-program service site, or creating a new user in IPT. These types of requests are made by visiting http://tinyurl.com/ucovacDelete. This allows UServeUtah the ability to assign and track delete requests and easily identify support trends for future training.

Requesting Access for Office Staff
Program directors are responsible for requesting access for new office staff or deactivating access for former employees. Requests can be made by visiting http://tinyurl.com/ucovacRequestAccess.

User Accounts
- **Office Staff** – accounts are created and deactivated by UServeUtah staff. Contact National Service Program Manager
- **Site Supervisors** – accounts are created and deactivated by Program Manager or office staff
- **Members** - accounts are created and deactivated by Program Manager or office staff